

# Course Material

## ERPNext

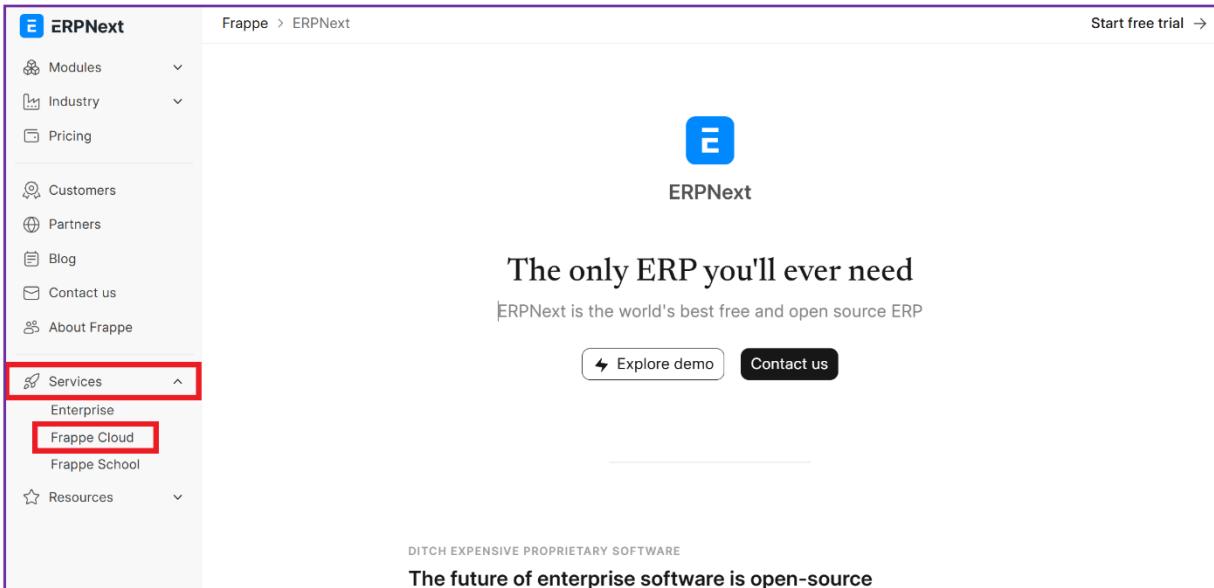
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### Installation

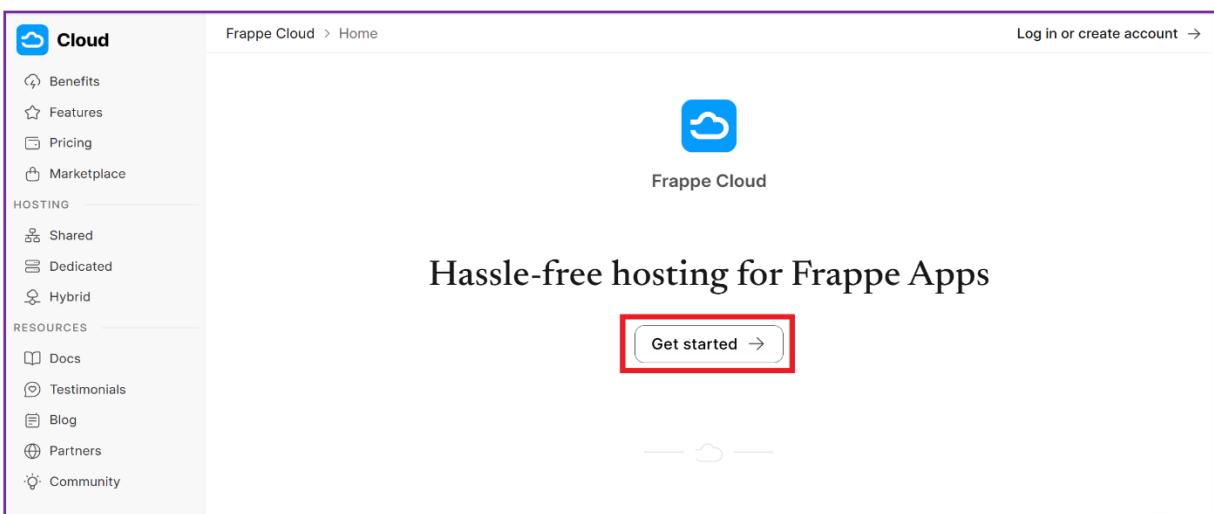
#### Sign Up/Log In:

1. Go to <https://frappe.io/erpnext>
2. Click on Services → Frappe Cloud.



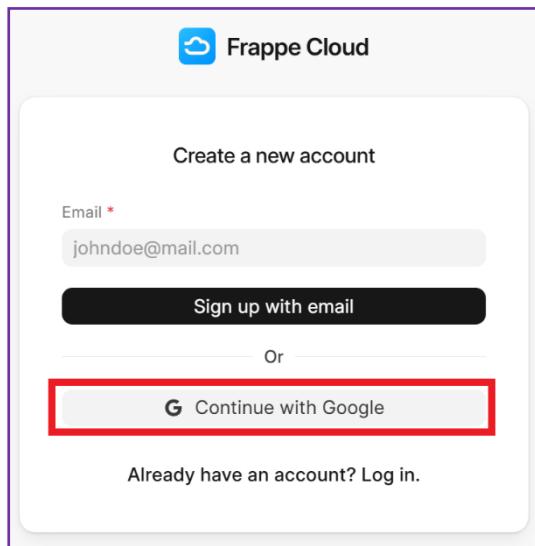
The screenshot shows the Frappe ERPNext website. On the left, there's a sidebar with links like 'Modules', 'Industry', 'Pricing', 'Customers', 'Partners', 'Blog', 'Contact us', and 'About Frappe'. Below these, under 'Services', there are three options: 'Enterprise', 'Frappe Cloud' (which is highlighted with a red box), and 'Frappe School'. Underneath the sidebar, there's a section titled 'The only ERP you'll ever need' with the subtext 'ERPNext is the world's best free and open source ERP'. At the bottom of this section are 'Explore demo' and 'Contact us' buttons. The main content area has a heading 'DITCH EXPENSIVE PROPRIETARY SOFTWARE' and the subtext 'The future of enterprise software is open-source'.

3. Click on Get started.

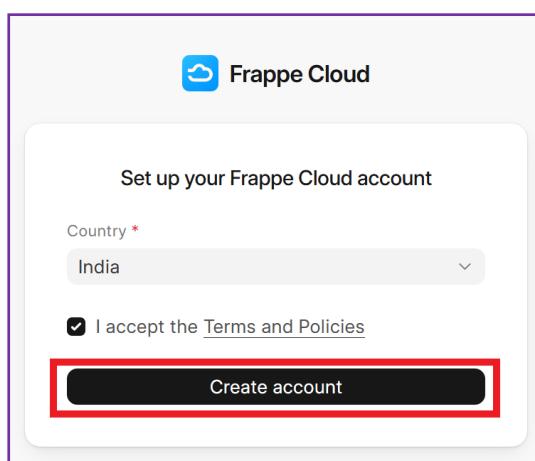


The screenshot shows the Frappe Cloud website. On the left, there's a sidebar with links for 'Cloud' (Benefits, Features, Pricing, Marketplace), 'HOSTING' (Shared, Dedicated, Hybrid), 'RESOURCES' (Docs, Testimonials, Blog, Partners, Community). The main content area features a large 'Frappe Cloud' logo and the text 'Hassle-free hosting for Frappe Apps'. A prominent 'Get started →' button is centered at the bottom of the page, which is also highlighted with a red box.

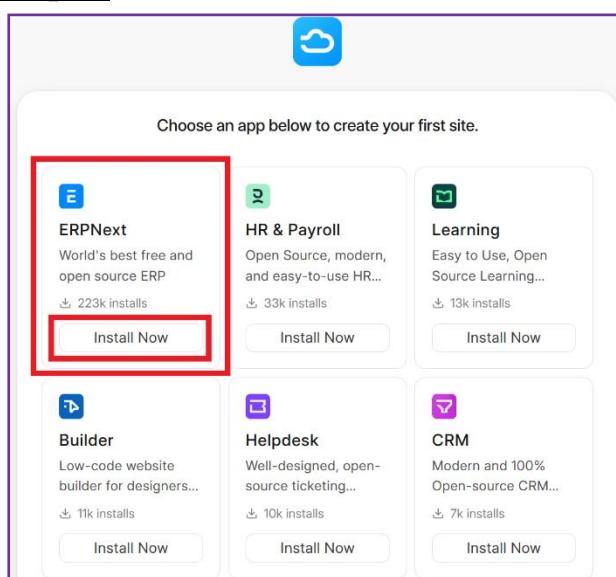
4. Click on **Continue with Google** to create a Frappe Cloud account using your Google ID.



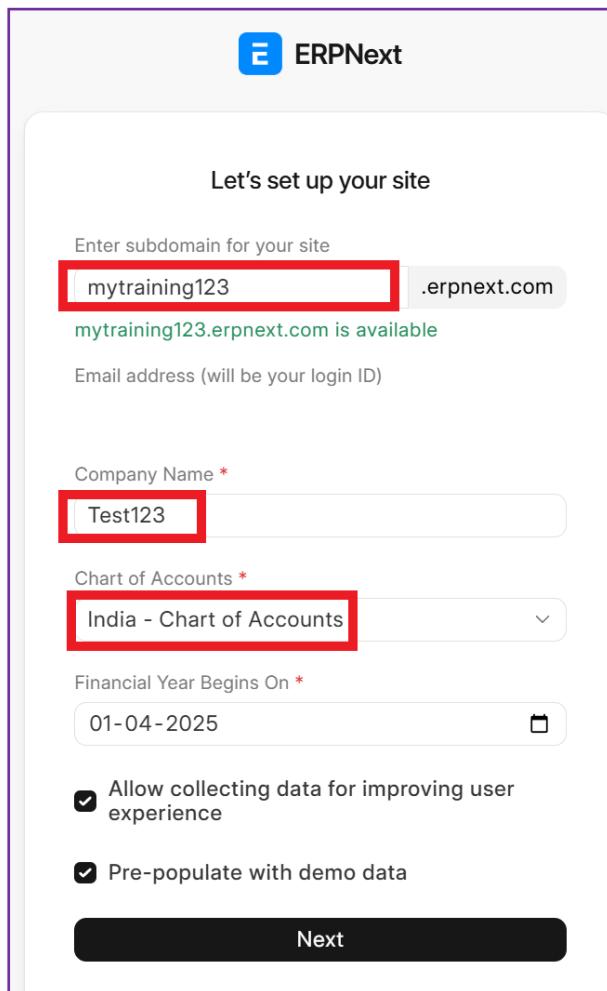
5. Click on **Create account** and follow the steps to set up your ERPNext account.



**Step 1:** Choose **ERPNext** and click on **Install Now**.



**Step 2:** Choose a subdomain name for your site and ensure its availability. Use your organization or institution name as the company name. Select **India – Chart of Accounts** and set the financial year beginning date. Click **Next** after updating the details.



ERPNext

Let's set up your site

Enter subdomain for your site  
mytraining123 .erpnext.com

mytraining123.erpnext.com is available

Email address (will be your login ID)

Company Name \*

Test123

Chart of Accounts \*

India - Chart of Accounts

Financial Year Begins On \*

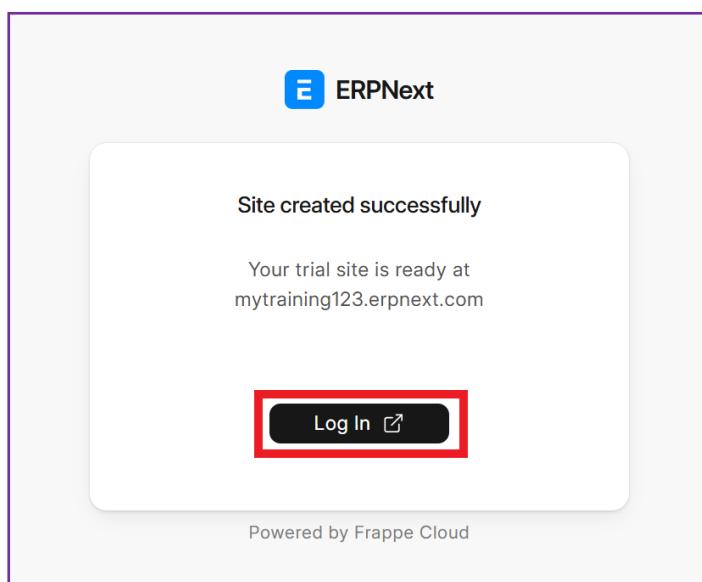
01-04-2025

Allow collecting data for improving user experience

Pre-populate with demo data

Next

**Step 3:** Click on **Log In** once the site is successfully created.



ERPNext

Site created successfully

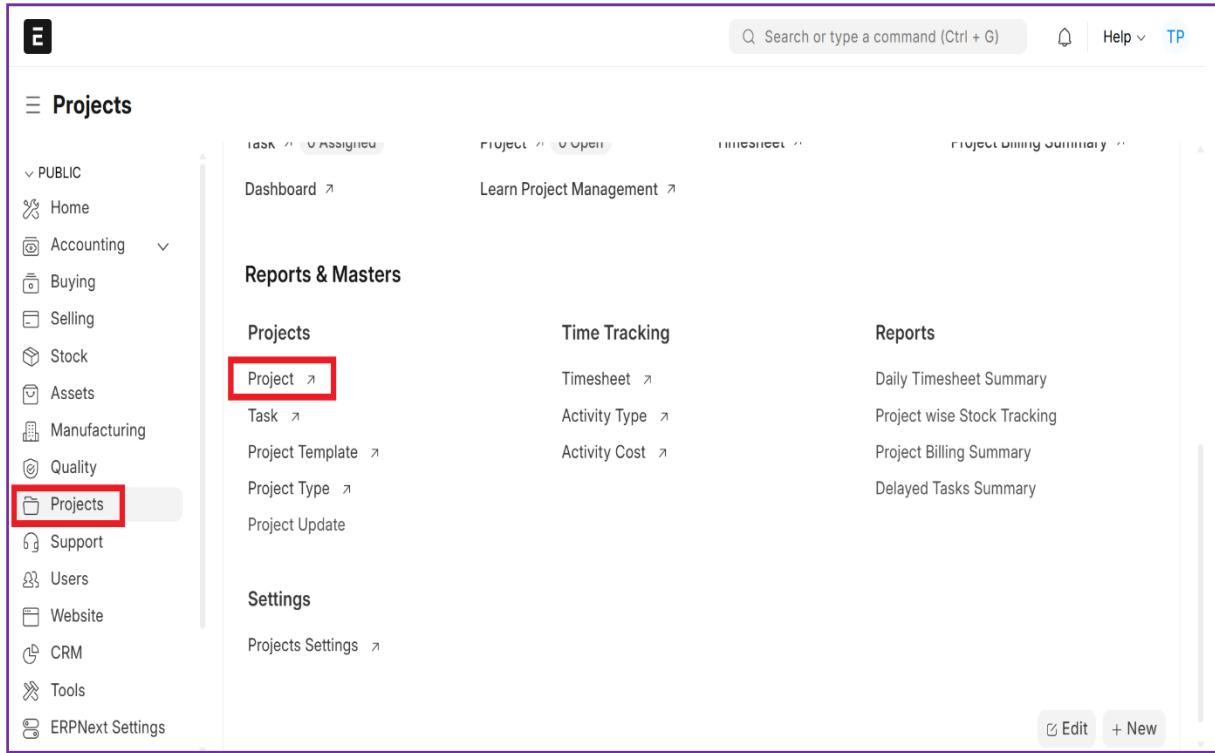
Your trial site is ready at  
mytraining123.erpnext.com

Log In

Powered by Frappe Cloud

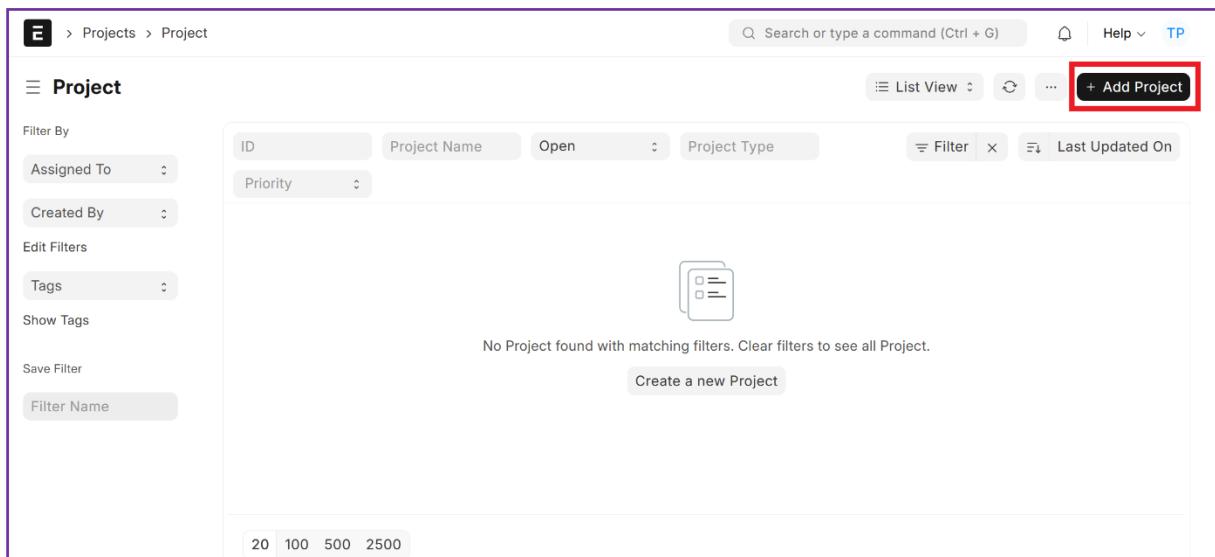
## ERPNext – User Guide

1. ERPNext dashboard will launch. Click on **Projects** and scroll down to select **Project** under **Reports & Masters**.



The screenshot shows the ERPNext dashboard. On the left, there's a sidebar with various project categories like Home, Accounting, Buying, Selling, Stock, Assets, Manufacturing, Quality, and a prominent 'Projects' link which is highlighted with a red box. The main content area has tabs for Task, Project, Timesheet, and Project Billing Summary. Below these tabs is a section titled 'Reports & Masters' containing three columns: 'Projects' (with 'Project' highlighted in red), 'Time Tracking' (with 'Timesheet'), and 'Reports' (with several options like Daily Timesheet Summary, Project wise Stock Tracking, etc.).

2. Click on **+ Add Project** to create a new project. Enter the desired project name and click on **Edit Full Form** to add more details. Enter the required details and click on **Save** to create the project.



The screenshot shows the 'Project' creation page. At the top right, there's a button labeled '+ Add Project' which is highlighted with a red box. The page has a header 'Projects > Project'. On the left, there are filter options for Assigned To, Created By, Tags, and a 'Create a new Project' button. The main area shows a table with columns for ID, Project Name, Open status, Project Type, Priority, and Last Updated On. A message at the bottom says 'No Project found with matching filters. Clear filters to see all Project.' There are also buttons for 'Edit View' and 'Edit Full Form'.

New Project

Series \*

PROJ-.####

Project Name \*

**PROJ-Test**

From Template

Company \*

Test123

**Edit Full Form**

**Save**

E > Projects > Project > New Project

Search or type a command (Ctrl + G) Help TP

**New Project** Not Saved

**Save**

Series \*

PROJ-.####

Project Name \*

**PROJ-Test**

Status

Open

Project Type

Internal

Is Active

Yes

% Complete Method

Task Completion

From Template

Expected Start Date  
07-04-2025

Expected End Date  
24-04-2025

Priority

Medium

Department

Marketing

3. Click on the + beside Task to create new tasks under the project.

E

Search or type a command (Ctrl + G) Help TP

**PROJ-Test** Open

Actions View ... Save

See on Website

Assigned To +

Attachments +

Tags +

Share +

Mon APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR

Wed

Fri

This is based on the Time Sheets created against this project

Connections

Project

**Task +**

Timesheet +

Issue +

Material

Material Request +

BOM +

Stock Entry +

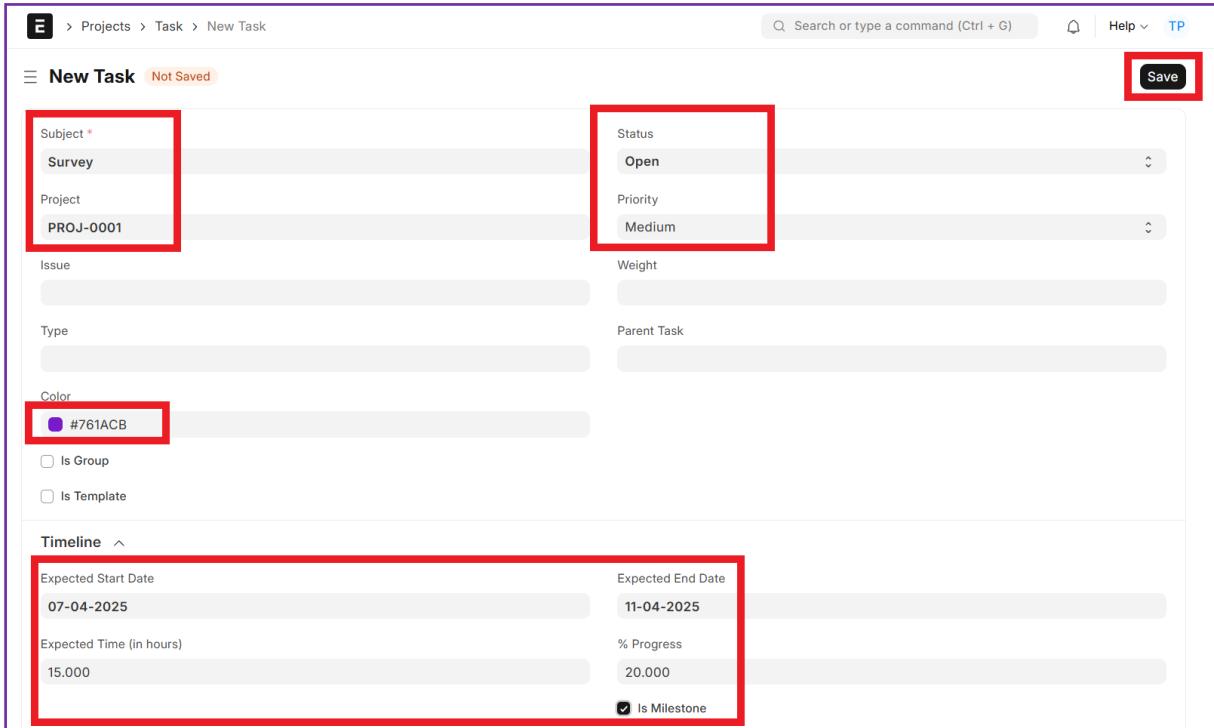
Sales

Sales Order +

Delivery Note +

Sales Invoice +

4. Create a new task named Survey or any desired name, enter the required details, and click **Save**. Assign a color to each task to make differentiation easier.



**New Task** Not Saved

**Subject \*** Survey

**Project** PROJ-0001

**Status** Open

**Priority** Medium

**Color** #761ACB

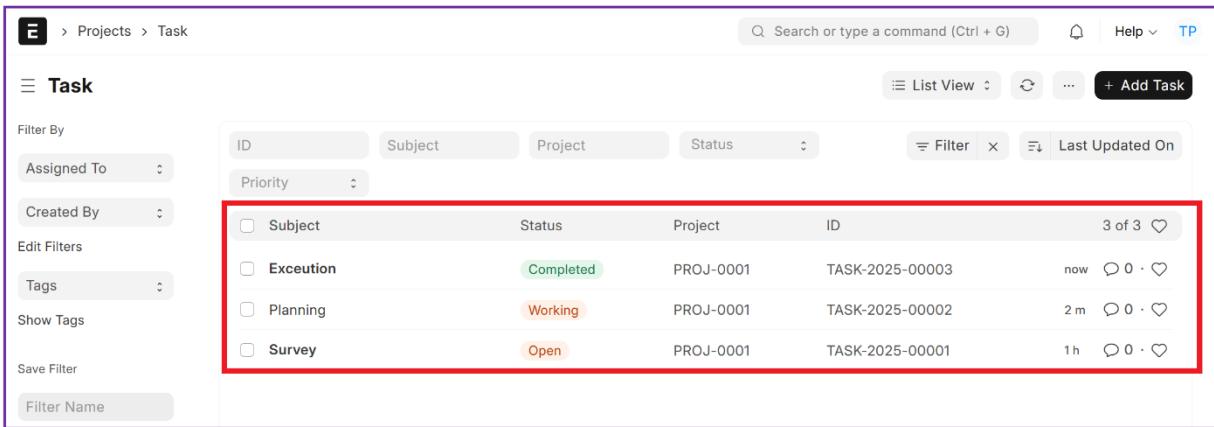
Is Group

Is Template

**Timeline**

Expected Start Date 07-04-2025	Expected End Date 11-04-2025
Expected Time (in hours) 15.000	% Progress 20.000
<input checked="" type="checkbox"/> Is Milestone	

5. Go to <https://mytraining123.erpnext.com/app/task> and create additional tasks such as Working (In-Progress) and Completed.



**Task**

**Filter By**

- Assigned To
- Created By
- Priority
- Tags
- Show Tags
- Save Filter
- Filter Name

**List View**

ID	Subject	Project	Status	
	Execution	Completed	PROJ-0001	TASK-2025-00003
	Planning	Working	PROJ-0001	TASK-2025-00002
	Survey	Open	PROJ-0001	TASK-2025-00001

6. Click on **List View** to quickly access **Gantt**, **Kanban**, and **Calendar** views, and more. These views provide an instant overview of the entire project.

**Task**

Filter By

- Assigned To
- Created By
- Tags
- Show Tags
- Save Filter

ID	Subject	Project	Status
Priority			
<input type="checkbox"/> Subject	Status	Project	ID
<input type="checkbox"/> Execution	Completed	PROJ-0001	TASK-2025-00001
<input type="checkbox"/> Planning	Working	PROJ-0001	TASK-2025-00002
<input type="checkbox"/> Survey	Open	PROJ-0001	TASK-2025-00001

+ Add Task

List View

Report View

Dashboard View

Gantt View

Kanban View

Calendar View

Tree View

**Task Gantt**

Filter By

- Assigned To
- Created By
- Tags
- Show Tags
- Save Filter
- Filter Name

April

06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Survey (TASK-2025-00001)												Planning (TASK-2025-00002) - 40%												
												Execution (TASK-2025-00001) - 100%												

Gantt View

+ Add Task

**Test**

Filter

Select Kanban

Kanban View

+ Add Task

• Open	• Working	• Pending Review	• Overdue	• Template
+ Add Task	+ Add Task	+ Add Task	+ Add Task	+ Add Task
Survey	Planning			
+	+	+	+	

**Task Calendar**

Calendar

Select Calendar

Filter By

- Assigned To
- Created By
- Tags
- Show Tags
- Save Filter
- Filter Name

Last Updated On

Calendar View

+ Add Task

April 2025

SUN	MON	TUE	WED	THU	FRI	SAT
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

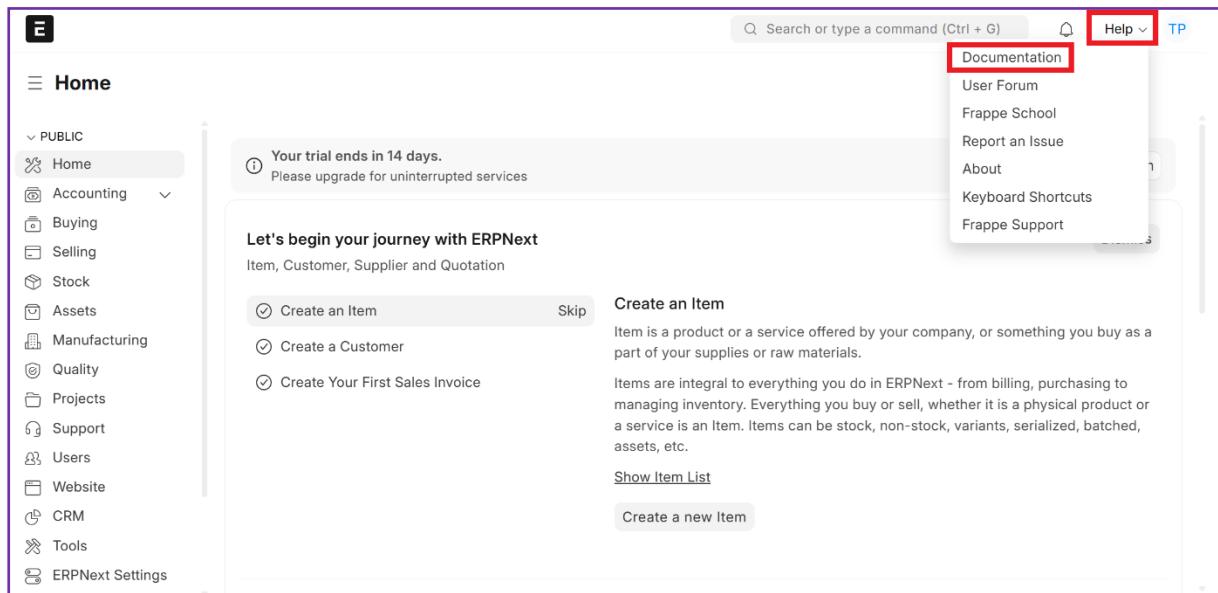
Survey

Planning

Execution

Execution

7. Go to the ERPNext homepage and click on **Help → Documentation** to access all available resources, including tutorials and guides.



The screenshot shows the ERPNext application's interface. On the left, there is a sidebar with a tree view of modules: PUBLIC (Home, Accounting, Buying, Selling, Stock, Assets, Manufacturing, Quality, Projects, Support, Users, Website, CRM, Tools), and ERPNext Settings. The 'Home' module is currently selected. At the top right, there is a search bar and a 'Help' dropdown menu. The 'Help' menu is open, showing options: Documentation (which is highlighted with a red box), User Forum, Frappe School, Report an Issue, About, Keyboard Shortcuts, and Frappe Support. Below the 'Help' menu, there is a message about a trial ending in 14 days and a 'Let's begin your journey with ERPNext' section with three initial steps: Create an Item, Create a Customer, and Create Your First Sales Invoice. There are 'Skip' and 'Create an Item' buttons, and descriptive text for each step.